



# Writing Effective Emails

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Publication Business Services

# Objectives

You will learn how to:

- Write an effective subject line.
- Convey the right message.
- Keep the message focused.
- Get a timely response from recipient.
- Review the message before you send it.

# What this webinar won't be

Out of scope:

- Managing files in your inbox/sent items.
- Outlook as a whole (saving, deleting, tools, options, file size, etc.)
- Security and privacy settings (spam, phishing, etc.)

# Interesting email

FACTS

- The average business user receives 25 email messages per day; increasing 10% per year.
- The average business user spends 2.6 hours per day reading and responding to email.
- 38% of employees have sent an e-mail without the required attachment.
- Email is public information.
- You never get a second chance to make a first impression.

# Imagine your own “inbox”

- Is it overloaded with a bunch of names?
- Do you look at the date it was sent/received?
- Do you look at the sender?
- What about the subject line?
- Do you start from the bottom?



**Mail**

Favorite Folders

Mail Folders

All Mail Items

- Mailbox - Wilson.Ann
  - Deleted Items (27)
  - Drafts [9]
  - Inbox
  - Junk E-mail
  - Outbox
  - Sent Items
  - Search Folders
- Mailbox - Enterprise Content Standard
  - Deleted Items
  - Drafts
  - Inbox
  - Outbox
  - Sent Items
  - Search Folders
- Mailbox - PubBiz
  - Annual Jobs Information
  - Deleted Items
  - DR Bypass Legal
  - Drafts
  - Inbox
  - Junk E-mail
  - Outbox
  - PASS

**Mail**

Calendar

Contacts

Tasks

## Inbox

Sender

Subject

Date Received

From Subject Received

## Date: Today

Wilson.Ann	Last Day to Vote For Your Co-Workers!	Wed 06/01/2011 11:02 AM
Granger.Bob	Summary box notice issue	Wed 06/01/2011 10:14 AM
Mayoral.Megan	CCPEA Flyer / Email	Wed 06/01/2011 10:06 AM
Wrigglesworth.Katherine	CIB Publication Manager	Wed 06/01/2011 9:55 AM
Wrigglesworth.Katherine	RE: Today we start our new workflo...	Wed 06/01/2011 9:41 AM
Wrigglesworth.Katherine	RE: Today we start our new workflo...	Wed 06/01/2011 9:37 AM
Kersten.Richard	FW: CLIP Processes	Wed 06/01/2011 9:34 AM
Wrigglesworth.Katherine	Dept Review: Due 6/6/11 NEW PF 411...	Wed 06/01/2011 9:33 AM
Penagos.Diana	7855 for Brandon Grimes ~submitte...	Wed 06/01/2011 9:32 AM
Grimes.Brandon	Management review requested, due ...	Wed 06/01/2011 9:27 AM
Wilson.Ann	Today we start our new workflow!!!	Wed 06/01/2011 9:20 AM
Grimes.Brandon	4159 MEO job in EDMS	Wed 06/01/2011 9:11 AM
Mowry.Trish	Please call Connie to invite to ERP... ..	Wed 06/01/2011 9:02 AM
Wrigglesworth.Katherine	Revised GPM 3000 - Criminal Investig...	Wed 06/01/2011 8:53 AM
Wrigglesworth.Katherine	A new announcement is awaiting yo...	Wed 06/01/2011 8:17 AM
Kersten.Richard	FW: Tax News June 2011	Wed 06/01/2011 7:53 AM
Penagos.Diana	FW: 7855 Brandon Grimes	Wed 06/01/2011 7:40 AM

## Date: Yesterday

Nahigian.Joy	Forms Tracking Team - Meeting Sum...	Tue 05/31/2011 4:49 PM
Mowry.Trish	Game instructions needed for today'...	Tue 05/31/2011 4:39 PM
Amador.Diana	RE: Revisions to New COD Forms	Tue 05/31/2011 3:20 PM
Paige.Alice	Obsolesce FTB 4058 PASS and 4063 P...	Tue 05/31/2011 2:59 PM
Amador.Diana	FW: Revisions to New COD Forms	Tue 05/31/2011 2:54 PM
Wrigglesworth.Katherine	PLEASE REVIEW: <a href="http://ftbnet2/Polici...">http://ftbnet2/Polici...</a>	Tue 05/31/2011 2:41 PM
Wrigglesworth.Katherine	FW: Policy File 6200 - IT Change Man...	Tue 05/31/2011 2:22 PM
Mamuzich.Patti	Policy File 6200 - IT Change Manage...	Tue 05/31/2011 2:09 PM
Hazeghazam.Andrea	HR Development Team - Growing Fut...	Tue 05/31/2011 1:41 PM
Nahigian.Joy	From Jennifer Thomas	Tue 05/31/2011 12:22 PM
Mowry.Trish	FW: Please review: FRP Signage Pane...	Tue 05/31/2011 12:22 PM

# When you read email

There are 3 things **you** (the reader) want to know:

- Why am I getting this?
- What do I need to do?
- When do I need to respond?

# 5 elements of email

- Audience
- Subject Line
- Salutation/Introduction
- Body/Content
- Closing



# Audience

Know the answers to these 3 questions:

- Who is my audience?
- What do they need to know?
- What action do I want them to take?

Careless emails do not invite careful responses.

# Choose your recipients carefully

To:

- Limit your recipients.
- Check to make sure it is the right person.

Cc and Bcc:

- Need to know basis.
- Choose wisely.

# Subject lines

- Ensure they are meaningful. Make your words count.
- Avoid vague or empty subject lines.
- Provide an opportunity for your reader to scan their inbox.
- Prep your reader for what comes next.

# Good/Bad subject lines

Good	Bad
<b>Your April Website Statistics</b>	<b>Web Stats</b>
<b>Important Travel Info.</b>	<b>Travel</b>
<b>FYI – Tina promoted!</b>	<b>Tina</b>
<b>News – Our webpage launched!</b>	<b>Help Spread the News!</b>
<b>DPRT – Due 6/24 – FTB XXXX</b>	<b>Review Form</b>
<b>Agenda – Staff Meeting 6/16</b>	<b>Meeting Agenda</b>
<b>655 confirmed for Thurs. Webinar</b>	<b>Training Registrants</b>

# Types of email

There are 3 basic types of business email.

Type	Response/Reply Prefix/Suffix	Subject Line Sample
Providing information	For Your Information (FYI) Need No Response (NNR) End of message (EOM)	See samples
Requesting information	Follow up	Follow up: Strategic Plan deadline
Requesting action	Action	Action: Review the Strategic Plan by 6/24



File

Undo

Redo

Print

Save

Find

Help

FYI - Donuts in breakroom - Message (Rich Text)

MessageInsertOptionsFormat TextDeveloperAdobe PDF



Paste



Cut



Copy



Format Painter

Clipboard

Calibri (Bo11A<sup>A</sup>





Basic Text



Address Book



Check Names



Attach File



Attach Item



Business Card



Calendar



Signature



Follow Up



High Importance



Low Importance

Options

This message has not been sent.



Send

To...

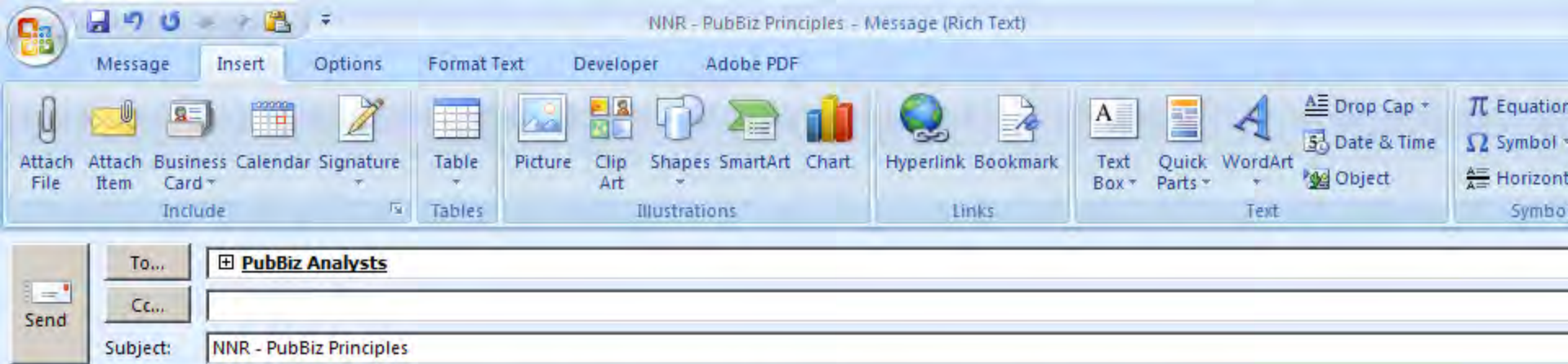
 **PubBiz Analysts**

Cc...

Subject:

FYI - Donuts in breakroom

Thank you for your hard work to get the 2011 Strategic Plan off to a great start. I brought in donuts to celebrate!



**The following is the foundation of our unit and the principles to follow when working with our customers.**

- Call or meet with your customer to seek clarification.**
- Understand there are always two sides to a story.**
- Slow down, take your time, and proofread your work.**
- Teamwork is important. Sometimes it takes the entire village to complete the task.**
- Own your mistakes and be responsible for your actions.**
- Meet your deadlines. Negotiate if you have to.**
- Engage in conversation with your customers. You will learn a lot.**
- Respond to your customers with a smile, no matter the request.**
  
- Share your vision. Your ideas can improve our work processes.**
- Exemplify excellence and it will come back to you tenfold.**
- Respect each other's individuality.**
- Value others' perspectives and experiences.**
- Inform others when necessary. Avoid gossip.**
- Commit to the vision of the bureau. Stay focused on the 10%**
- Embrace change and be open-minded.**

**Ann M. Wilson** | Supervisor | Franchise Tax Board  
Publication Business Services | Learn about [PubBiz](#)  
**916.845.6655** | **MS A382**

**Together, we create to communicate!**



Ann will be in late (EOM) - Message (Rich Text)

MessageInsertOptionsFormat TextDeveloperAdobe PDF



Paste

Format Painter

Clipboard



Cut



Copy




Format Painter

Calibri (Bo11A<sup>A</sup>



**B***I*U



Basic Text



Address Book



Check Names

Names



Attach File



Attach Item



Business Card

Include



Calendar



Signature



Follow Up



High Importance



Low Importance

Options

This message has not been sent.



Send

To...

Cc...

Subject:

 **PubBiz Analysts**

Ann will be in late (EOM)

|



# Quick subject line prefixes

Prefix	
<b>Action:</b>	<b>Minutes:</b>
<b>Agenda:</b>	<b>NNR:</b>
<b>Decision:</b>	<b>Personal:</b>
<b>EOM:</b>	<b>Reminder:</b>
<b>Follow-Up:</b>	<b>Request:</b>
<b>FYI:</b>	<b>Response Needed:</b>
<b>Help:</b>	<b>Procedures:</b>
<b>Instructions:</b>	<b>Schedule:</b>
<b>Kudos:</b>	<b>Sharing:</b>
<b>Meeting:</b>	<b>Update</b>

# Salutation/Introduction

If	Then	Example
You know your recipient.	No formal introduction is necessary. Use their first name.	Hi Michelle:
You don't know the reader well or the relationship is formal.	Use a title and a last name. Otherwise, use the first name.	Dear Ms. Brown: Dear Gail:
You are writing to two people.	Use both names.	Dear Mr. Jones and Ms. Smith: Dear Alex and Diane:
You are writing to a group.	No names are necessary. Categorize the group.	Dear managers: Hi everyone:
You don't know a person's gender.	Use their full name rather than a title.	Dear Dana Simms: Dear B.J. Black:
You are responding to an email.	It is not necessary to use a salutation.	

# Body/Content

Do	Don't
<b>Be concise and get to the point as quickly as possible.</b>	<b>Mix topics, projects, or ideas.</b>
<b>Use bullets/numbers.</b>	<b>Leave out important details. (due date, meeting time, reply date, etc.)</b>
<b>Use standard capitalization and spelling.</b>	<b>Use acronyms or jargon your reader won't understand.</b>
<b>Send to the right people.</b>	<b>Insert attachments... unless your recipient needs to view the full file in order to edit or archive it, then of course sending an attachment is appropriate.</b>

New Health and Safety - Message (Rich Text)

Message Insert Options Format Text Developer Adobe PDF

Cut Copy Paste Format Painter Clipboard

Calibri (Bo 11 A A

B I U ab A

Basic Text

Address Book Check Names Names

Attach File Attach Item Business Card Calendar Signature Include

Follow Up High Importance Low Importance Options

This message has not been sent.



To... Wilson,Ann

Cc...

Subject: New Health and Safety

Hi:

Remember how I discussed last week that the safety officer went to a conference and there was new legislation passed down about how each department has to follow these new health and safety regulations. Well, this is to let you know that we have until July 1 to review the requirements for our department. So, could you please read the new requirements and provide any comments Anita by 6/24. She will then need to incorporate all of your comments into our new policies and procedures. Your help is very much appreciated as this will make us compliant with the law. Let me know if you have any questions. Thanks so much!

Ann

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|



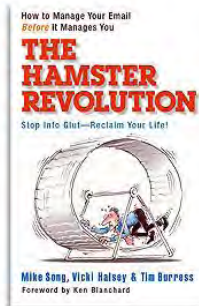
# framework

**A = Action** --- What action do I want from my reader. Use verbs such as read, review, respond, reply,

**B = Background** --- What is the background of this request. Who wants me to do it and why.

**C = Closure** --- When does your reader need to respond and who do they respond to.

Adapted by:



Health and Safety - Message (Rich Text)

Message Insert Options Format Text Developer Adobe PDF

Cut Copy Paste Format Painter Clipboard

Verdana 10 A A Bulleted List Numbered List Link Basic Text

Address Book Check Names Names

Attach File Attach Item Business Card Calendar Signature Include

Follow Up High Importance Low Importance Options

This message has not been sent.



To...  
Cc...  
Subject:

**PubBiz Analysts**

Health and Safety

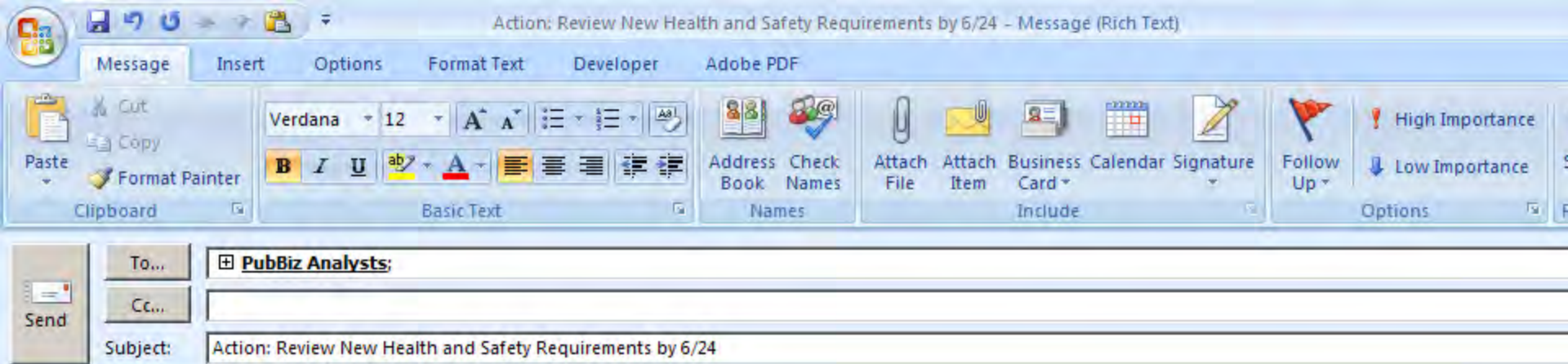
Hi:

~~Remember how I discussed last week that the safety officer went to a conference and there was new legislation passed down about how each department has to follow these new health and safety regulations. Well, this is to let you know that we have until July 1 to review the requirements for our department. So, could you please read the new requirements and provide any comments Anita by 6/24. She will then need to incorporate all of your comments into our new policies and procedures. Your help is very much appreciated as this will make us compliant with the law. Let me know if you have any questions. Thanks so much!~~

Ann

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Hi Team:

Action: Review the new health and safety requirements and respond to Anita by 6/24.

Background: Compliance with a new law that takes effect on July 1. Anita will incorporate your comments into our policies and procedures.

Closure: Respond with your comments to Anita by 6/24.

Let me know if you have any questions.

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# Closing

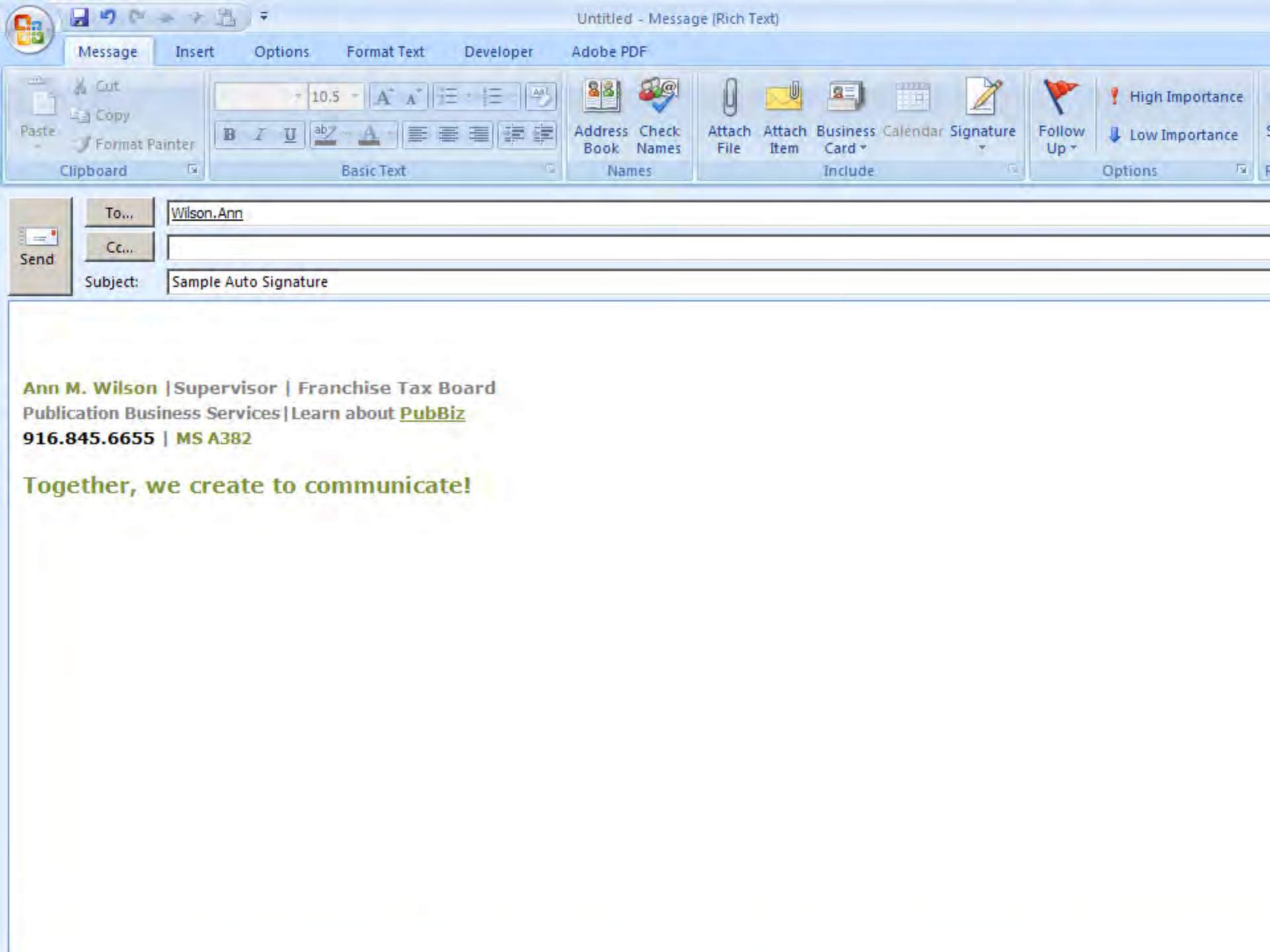
Use an auto signature that consists of the following:

- Your name
- Your title
- Your agency name (if you do a lot of correspondence outside of the department)
- Address (if needed)
- Phone and fax number

Allows your recipients to have your contact information in your email in case they need to pick up the phone and call.

Add disclaimers to your internal and external emails. Can protect you from liability.



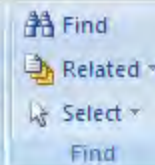
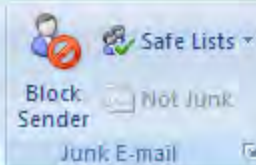




Message

Developer

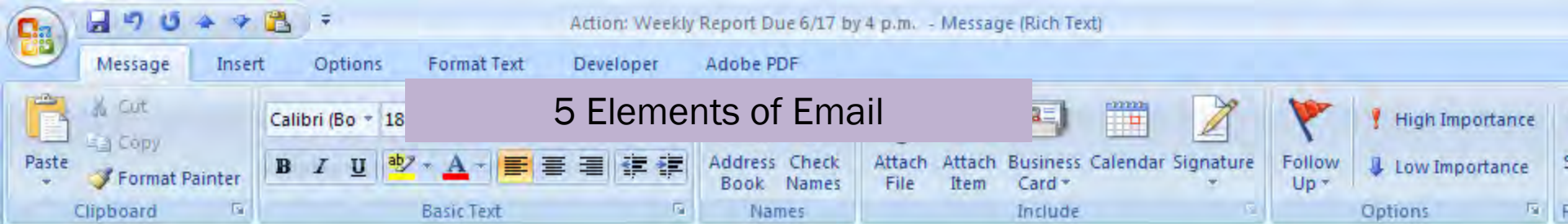
Adobe PDF



From: Nahigian.Joy  
To: Wilson.Ann  
Cc:  
Subject: Sample Confidentiality Statement

Sent: Fri 05/27/20

**CONFIDENTIALITY NOTICE:** This email from the State of California is for the sole use of the intended recipient and may contain confidential and privileged information. Any unauthorized review or use, including disclosure or distribution, is prohibited. If you are not the intended recipient, please contact the sender and destroy all copies of this email.



## 5 Elements of Email

This message has not been sent.

Send	To...	<b>PubBiz Analysts</b>
	Cc...	Schlie,Robert
	Bcc...	Fallon,Michelle
	Subject:	Action: Weekly Report Due 6/17 by 4 p.m.

Audience

Subject Line

Hi Team:

Salutation

**Action:** Provide your weekly caseload statistics for week ending 6/10.

**Background:** Bob needs to include these in his weekly report to Michelle.

**Closure:** Email them to me by 6/17, just submit your caseload number in the subject line.

Example: 36 (EOM)

Thanks so much.

Body/Content

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Closing

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# Before you push



- Spell check and proofread your message.
- Re-read your message.
- Does it portray a professional tone?
- Is the name and address in the “to” line correct?

You can not take back what has already been sent!

# Email tips



- 1. Follow your agency/department policies and procedures.**
- 2. Choose your recipients wisely.**
- 3. Avoid fancy typefaces, quotes, or emoticons. No flash or bling necessary.**
- 4. Avoid net lingo and acronyms.**
- 5. Pick up the phone! Email may not be the best medium.**
- 6. A reminder never hurts. If your recipient hasn't responded, ping 'em again.**
- 7. Never send mixed messages. One idea per message.**
- 8. Prevent email overload - Do not reply to email with a "thanks!"**
- 9. Respond promptly and accurately.**
- 10. Do not use all uppercase in emails. It's the equivalent of shouting.**

Any questions?

# In summary

We learned how to:

- Write an effective subject line.
- Convey the right message.
- Keep the message focused.
- Get a timely response from recipient.
- Review the message before you send it.

Contact information:

Ann Wilson

[Ann.wilson@ftb.ca.gov](mailto:Ann.wilson@ftb.ca.gov)

(916) 845-6655



The webinar is over.

